Farm Life
Planning Assistant

The Opportunity

Farm Life has been growing steadily and is now entering an exciting time of accelerated expansion. As such, our coaches are looking for a mission-focused, high-performing Planning Assistant.

Importantly, the Assistant will have the skills, sensitivity and personal confidence to liaise with clients and support the coaches in achieving their short-term and long-term goals through coordinating, liaising, scheduling, plan writing and monitoring project workflow. The Assistant will work with the administrative team to bring efficient and effective administrative processes to ensure outstanding front line service to clients and their professional team.

Our Team

We are looking to grow our team with people who have a passion for excellence and apply a high ethical standard in their work. Prioritizing the client first, we ensure that strong, positive processes are in place to achieve our mission of "Keeping Farmers Farming".

Why Farm Life

Farm Life is committed to ensuring that all Farm Advisors are CAFA certified and have a family farm background or strong experience working with farm families. This ensures the caliber of our advisors and our brand stays consistently strong in delivering the highest quality facilitation to farm families. We have also honed our process and provide a network of highly competent expertise in family enterprise planning, tax efficiency, farm corporate structure and legal advice. Farm Life also brings an operations and marketing team that is dedicated and focused in telling our story and promoting our skillset to farmers. Our team is always forging new partnerships and building awareness of our brand promise and expertise including agricultural media, local, provincial and national farm associations, shows and social media.

Top Attributes:

- Brings initiative and a flexible team attitude to work every day (a “Can-do” attitude)
- Impeccable attention to detail and thoughtful time manager in liaising with multiple stakeholders and professionals to meet deadlines
- Strong ability to exercise good judgment, anticipate next steps and take pro-active actions to move our clients through their planning process.
- Demonstrated ability to use discretion and the strictest confidentiality in all work
- Demonstrated ability to work under pressure and meet tight deadlines
- Proven ability to build and establish strong relationships with clients, professionals and members of the team
- Independent worker and effective time manager in meeting individual and team goals
- Analytical, detailed and thoughtful approach to managing time and completing the written plans and file prep for client meetings.
- Spirit of continuous learning and growth

Job Tasks and Responsibilities

- In collaboration with advisors, develop all client scope of engagements
- Develop and execute processes for tracking client progress against expectations to ensure timelines are met.
- Primary contact for advisors on the road to gain follow ups and updates on client files
- Build relationships with clients and professionals to ensure positive, professional and high-quality experiences in working with Farm Life
- Gather and coordinate any required documentation for the Succession Planning process from the client and professional team (accountants, lawyers, etc.)
- Research, analyze and provide insights on client cases to support the planning process
- Pro-actively flag issues and opportunities to ensure client plans stay on schedule
- Book and prepare for all client meetings including drafting agendas and preparing professional materials
- Writes, edits and finalizes the final product deliverable (the plan) to ensure a polished, engaging and high-quality output for our clients

- Use and develop Farm Life’s CRM to track progress on client cases, develop reports, assign tasks, capture client data and follow up on leads
- Work with the advisory team to monitor daily each client file and update information in Farm Life’s CRM within 48 hours to track meeting notes and client communications
- Report weekly on the progress of client cases and identify areas requiring immediate attention
- Maintain templates, electronic and paper client files in an organized, efficient manner

Experience and Education

- Post-secondary degree or diploma preferred in Business, Farm Management or a related field or combination of education and experience. Agriculture experience considered a strong asset.
- Minimum of 2 years of experience in case coordination, project management or comparable role
- Proficient in Microsoft Office Suite to include: PowerPoint, Outlook, Excel and Word
- Experience with Salesforce an asset
- 2 years’ experience in coordinating the needs of multiple stakeholders to positively achieve a goal

Farm Life believes recruiting and retaining the best team members is pivotal to achieving our mission of Keeping Farmers Farming. Please contact Elizabeth Teleki at 705-775-8000 to learn more about the position or email your resume and cover letter to elizabeth@farmlifefinancial.ca.